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## Bulgaria

**Post:** Sofia

### Bulgaria's Evolving Wine Market Presents New Opportunities

**Report Categories:**

Wine

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**Report Highlights:**

Post forecasts Bulgaria's 2017 grape crop at 250,000 metric tons (MT), most of which will be used to produce about 140 million liters of commercial wine. The Bulgarian wine sector continues to evolve, driven by investments in the sector, increasing disposable incomes, tourism, and thriving retail and hotel, restaurant, and catering (HORECA) sectors.

Wine consumption increased in 2016 and consumer trends point to a growing preference for higher-quality wines. January-October 2017 data indicate a 24-percent increase in wine imports by volume and 21 percent by value. Poland, Sweden, China, and Russia were the top export markets for Bulgarian wine (value terms) in 2016 and in 2017.

## **General Information: PRODUCTION**

FAS Sofia estimates that Bulgaria's 2017 grape harvest will reach 250,000 MT, of which about 210,000 MT will be processed into 140 million liters of commercial wine. Other estimates predict that grape production will reach 350,000 MT and 150 million liters of commercial wine.

At the end of November 2017 (source: Ministry of Agriculture (MinAg) [Weekly Bulletin #49](#)), harvest reports estimated 47,800 hectares (HA) yielded 238,000 MT of grapes, with an average yield of about 5.0 MT/HA. Weather during the year was mixed. The cold winter caused winterkill losses in some region, although more favorable spring weather with sufficient precipitation followed. Although warm and dry conditions in July and August led to some yield losses during harvest, these conditions also created favorable grapes for wine production. Rain disrupted the 2017 harvest in some areas, but the overall quality of the crop was reported as favorable and better than 2016.

The 2016 wine grape production declined from the 2015 record by 19 percent. Total vineyard acreage remained static, but harvested area decreased by six percent due to unfavorable weather and a larger non-harvested area. This also resulted in a 15-percent decrease in average yield from 6.8 MT/HA in 2015 to 5.8 MT/HA in 2016 (Table 1).

In September 2017, MinAg published the results of a 2015 [statistical survey](#) regarding wine grape cultivation as per EU Regulation 1337/2011 (Vineyard Basic Survey Bulgaria 2015). Results showed that 47,179 farms grow wine grapes in Bulgaria, with 27 percent concentrated in the southcentral region, and 25 percent located in the southeastern region. Also, just two percent of wine grape farmers (about 1,000 farms) cultivate 65 percent of the vineyards under production. These farms tend to average in size above 10 HA and are usually associated or owned by wine makers. Conversely, 75 percent of grape farms are small, typically under 0.5 HA, and cultivate only nine percent of vineyard acreage.

### **Vineyard Area**

2016 vineyard acreage increased by less than one percent to 50,892 HA. Abandoned, fallow vineyards remained at 12,000 HA. 72 percent of planted vineyards were harvest (76 percent in 2015). By region, the southwestern region achieved the highest percentage of harvested area at 90 percent, followed by the southcentral region at 74 percent (Table 1). The largest grape area concentration continued to be in the southeastern and southcentral regions, at 37 and 33 percent, respectively.

Immature, non-yielding vineyards accounted for three percent of total area, with 783 HA newly planted in 2016. Wineries continued to expand with new plantings and by the replacement of older vineyards with new ones. According to the Wine Chamber in Bulgaria, about 25 percent of vineyards were planted with new stock in recent years.

According to the abovementioned 2015 [MinAg survey](#), 59,991 HA of vineyards are entered in the official vineyard register, which includes also vine seedlings nurseries. Varieties suitable for cultivation without protected designation of origin (PDO) and protected geographic indication (PGI) comprised 23,038 HA or 38 percent of total acreage, followed by PGI wines at 21,362 HA or 36 percent, and PDO

vineyards at 15,340 HA or 26 percent.

Despite the uptick in white grape planting, red varieties continue to dominate, with 66 percent of harvested area in 2016. White varieties comprised 34 percent of harvested area (Table 1). Per the MinAg survey, red varieties were Merlot (16 percent), Cabernet Sauvignon (15 percent) and Pamid (local variety) (11 percent). About 40 percent of the farms grow white varieties and 60 percent grow red varieties. Among white varieties, the most dominant are Rkatsiteli (nine percent), Muscat Ottonel (seven percent), Misket (seven percent), Chardonnay Blanc (five percent), and the local variety Dimyat (five percent). Bulgarian varieties such as red Pamid, Mavrud, Gamza, Rubin, and Melnik as well as white Dimyat account for about 20 percent of vineyards and are becoming more popular among wine makers due to their unique characteristics.

Grape stock age is still a challenge, despite active investments over the last decade using EU funds. Per the MinAg survey, only 18 percent of vineyards are under nine years, while 69 percent are over 30 old. For white varieties, equivalent indexes are 16 and 76 percent, respectively, and for red varieties are 18 and 65 percent, respectively. Due to the increasing popularity of white wines more investment has occurred in white varieties in the last three years.

**Table 1: Industry Development 2015 and 2016**

| <b>Vine Industry Development 2016 and 2015</b> |             |             |
|--|-------------|-------------|
|  | <b>2016</b> | <b>2015</b> |
| <i>Total Vineyard Area on Farms</i>            | 50,892      | 50,705      |
| - Protected Designation Origin (PDO), HA       | 15,900      | 15,355      |
| -Protected Geographic Indication (PGI), HA     | 21,115      | 21,432      |
| -Other (without PGI/PDO), HA                   | 23,403      | 23,201      |
| Total Harvested Vineyards, HA, including:      | 36,551      | 38,712      |
| -Table Grape Vineyards, HA                     | 2,009       | 2,254       |
| -Wine Grape Vineyards, HA                      | 34,542      | 36,458      |
| --Of which: White Varieties, HA                | 11,631      | 12,421      |
| Red Varieties, HA                              | 22,911      | 24,037      |
| <i>Grape Production, Total, MT</i>             | 211,083     | 261,820     |
| • Wine grapes, MT                              | 199,547     | 244,357     |
| • Purchased for commercial wine making         | 173,503     | 195,860     |
| • Used for home winemaking                     | 26,765      | 42,176      |
| • PDO grapes, MT                               | 1,510       | 2,630       |
| • PGI grapes, MT                               | 54,470      | 76,850      |
| • Other (without PGI/PDO), MT                  | 143,570     | 165,300     |

|                           |                              |                              |
|---------------------------|------------------------------|------------------------------|
| • Table Grapes, MT        | 10,066 (11,540 per Eurostat) | 16,320 (17,040 per Eurostat) |
| • From Standing Vines, MT | 1,470                        | 1,143                        |

Source: MinAg Statistical Bulletins, #327/May 2017 and Eurostat

### Grape Yields, Production and Use

Average grape yields decreased in 2016 to 5.78 MT/HA, a 15-percent decrease from 2015 due to unfavorable weather (very rainy spring followed by hot and dry summer) and reduced inputs. As a result, grape production decreased by 19 percent and quality was reported as average.

**Table 2: Grape Production and Utilization, 2014 – 2016**

|  | 2014    |         | 2015    |         | 2016    |         |
|--|---------|---------|---------|---------|---------|---------|
|  | MT      | Percent | MT      | Percent | MT      | Percent |
| Total grapes                                 | 132,731 | 100     | 261,820 | 100     | 211,083 | 100     |
| Grapes for wine manufacturing                | 123,912 | 93.3    | 242,936 | 92.7    | 203,242 | 96.3    |
| Grapes for direct consumption                | 8,819   | 6.6     | 18,884  | 7.2     | 7,841   | 3.7     |
| Grapes processed at commercial wineries*     | 103,521 | 83.5    | 195,860 | 80.6    | 173,503 | 85.4    |
| Grapes processed for homemade wine*          | 10,808  | 8.7     | 42,176  | 17.4    | 26,765  | 13.2    |
| Other products*                              | 9,583   | 7.7     | 4,900   | 2.0     | 2,974   | 1.4     |
| *as a share of grapes for wine manufacturing |         |         |         |         |         |         |

Source: MinAg Statistical Bulletins, #327/May 2017

96 percent of total grapes were used for wine, a larger share over previous years due to demand. However, grape stocks declined by 16-percent in absolute volume. In 2016, most commercial wineries reduced grape purchases and produced 121 million liters of wine, an eight-percent decrease from 2015 (Table 3). Wineries also focused on varietal production which did not require protected origin (PDO) or geographic indication (PGI) status. Non-PDO and/or non-PGI wines accounted for 69 percent of production in 2016, compared to 60 percent in 2015. Reduced grape supplies also affected grape availability for homemade production, which accounted for 13 percent of wine grapes in 2016, compared to 17 percent in 2015 (Table 2). As a result, homemade wine production declined from 17 million liters to 13 million liters.

Bulgaria's wine industry currently consists of over 260 wine makers, most of whom are small to medium sized. About 200 wineries produce wine on a regular basis. The capacity of the wineries varies widely from 50,000 liters to 1.8 million liters, with a total capacity of 200 million liters. New 19 wineries are in process of being built and completed in the near future. Post forecasts higher commercial wine production in 2017, around 140-150 million liters and continued lower production of homemade wine.

**Table 3: Bulgarian Wine Production, 2014-2016, thousand liters**

|  | 2014 | 2015 | 2016 | Percent Change |
|--|------|------|------|----------------|
|--|------|------|------|----------------|

|  | (000)         | (000)          | (000)          | 2016/2015   |
|--|---------------|----------------|----------------|-------------|
| With protected designation of origin (PDO) | 1,053         | 1,686          | 951            | -44%        |
| With protected geographic indication (PGI) | 32,223        | 50,372         | 36,098         | -28%        |
| Other                                      | 41,419        | 78,957         | 83,729         | +6%         |
| <b>Commercial Total</b>                    | <b>74,695</b> | <b>131,015</b> | <b>120,778</b> | <b>-8%</b>  |
| Grapes must                                | 8,615         | 5,666          | 3,721          | -34%        |
| Homemade                                   | 4,808         | 20,075         | 12,619         | -37%        |
| <b>Total</b>                               | <b>79,503</b> | <b>151,090</b> | <b>133,397</b> | <b>-12%</b> |
| • White Wine (Eurostat)                    | 81,400        | 43,900         | 72,200         | +64%        |

Source: MinAg Statistical Bulletins, #327/May 2017 and Eurostat

## CONSUMPTION AND DEMAND

Higher incomes, urbanization, and increased demand for lower-alcohol beverages (versus spirits) led to wine consumption and sales growth in 2016. Wine is attracting new customers, especially women and younger people. New product launches, increased promotional events, and social media marketing attracted more attention and boosted sales in 2016 and 2017. 2016 wine sales achieved 3.4 percent growth over the previous year, reaching 126 million liters (source: Euromonitor). Market assessments indicate that similar levels of growth will persist through 2021 when wine sales are forecast to reach 149 million liters. Wine's share of total alcohol sales (by volume) increased from 16 percent in 2014 to 17 percent in 2015/2016, despite the decline in local production.

**Table 4: Market Development**

| Wine Market Development 2013-2017 |         |         |         |         |         |
|-----------------------------------|---------|---------|---------|---------|---------|
| Wine Sales                        | 2013    | 2014    | 2015    | 2016    | 2017    |
| Wine Sales in Liters              | 115,500 | 111,100 | 122,100 | 126,300 | 129,600 |
| Wine Sales in Million Euro        | 487     | 473     | 515     | 532     | 542     |

Source: Euromonitor

Sales increased in value by 3.1 percent in 2016 to over 1.0 billion leva (\$650 million) with prospects of reaching 1.2 billion leva (\$710 million) by 2021. Wine sales in total share of the alcohol market also grew from 29 percent in 2014 to over 30 percent in 2015/2016. Higher sales by value also reflect an increasing preference for higher-quality wines. Industry sources indicate that the majority of sales in 2016 came from wines priced 6.00 to 9.00 leva/bottle (\$3.75-\$5.60). About 42 percent of sparkling and 30 percent of red-wine sales are in this segment. For white wines, 33 percent of sales are in the category of 3.50-6.0 leva/bottle (\$2.20- \$3.80). For rose, 52 percent of sales are priced at 5.0-8.0 leva/bottle (\$3.10-\$5.00). However, the highest sales growth was for wines priced over 13.0 leva (\$8.10), with red-wine sales in this category jumping by 49 percent over the previous year.

Bulgaria has produced and consumed wines since ancient times and Bulgarian wine drinkers come from all walks of life. However, demand is shifting to higher quality wines, new flavors, and new varietal blends. Younger consumers clearly tend to prefer higher quality, search for new varieties, and tend to

buy more expensive wines. Retailers also focus on private label wines, which tend to be lower priced. Although the market may see more private label wines in the future, a general preference towards mid-priced and premium wines is likely to dominate.

Commercial sales are slowly, but consistently, overtaking homemade wine sales. Although the share of homemade wine in total consumption does not exceed 15 percent, this type of wine is sometimes sold through illicit channels and negatively affects legitimate wine sales.

According to the Wine Chamber of Bulgaria, local wine achieves 70 million liters in commercial sales, and imported wines make up 50 million liters of imported wines. Another 20 million liters of wine is the homemade which makes total wine consumption at around 140 million liters. Currently the industry is more oriented towards meeting local demand. About 60 percent of commercial domestic wine is sold on the local market. In 2016 the quality of local wines has improved considerably due to grape quality, wine-making expertise, and investments by major wineries.

Retail wine sales accounted for 82 percent of total sales in 2016 compared to 81 percent in the previous year (by volume). Higher volume sales also led to increased share of wine sales by value, from 58 percent in 2015 to 60 percent in 2016. In 2017, retailers made a special emphasis on their wine departments expanding the wine variety, making more frequent promotions and introducing new products. Metro Cash and Carry upgraded its wine section and now offers over 1,000 wines including wine from 66 Bulgarian and more than 200 foreign wineries from 20 countries. Many of the wines come from small and/or local wineries offering unique characteristics.

Hotel, restaurant, and catering (HORECA) accounted for 18 percent of wine sales by volume (23 million liters) and 40 percent by value in 2016. HORECA sales increased marginally, mainly due to significant mark-ups of up to 270 percent which did not allow for stronger performance. The HORECA channel relies mainly on imported wines due to consistent supply, quality, and price terms. Post expects that within five years, this channel will play a more critical role for new product launches, wine promotions, and as a means of educating consumers. More flexible price points are likely. Restaurants and wine bars will play an increasingly important role for sales of quality wine.

About 93 percent of wine sales are red and white varieties, however, rosé's popularity is growing. Growth for rosé and white-wine sales is expected to be between four to eight percent. Rosé sales growth in 2016 achieved 10 percent. The quality of rosés offered in retail and in HORECA outlets improved in 2016. Rosé became fashionable and a sign of new developed consumer tastes towards new products. New rosé wines on the market have lighter color, improved acidity levels, and more delicate aromas. Port and sherry also have good prospects with projected growth of 1-2 percent. Competition is likely to remain intense with heavy marketing for new products.

Imported wines comprised about 10 percent of market share in 2016 (Table 5), are priced at mid to higher levels, and appeal to higher-income and younger urban consumers. Italian wines dominate due to quality and affordability, especially for whites like Pinot Grigio. Industry estimates indicate that French and Italian wines account for about five percent of the market, followed by Spanish wines with two percent. Another five percent are new world wines from the United States, Chile, New Zealand, South Africa, Australia, and Argentina.

Importers are expanding their wine portfolios with whites, rosés, and more affordable, but good quality products. Because few Bulgarian wineries produce rosés, imported rosés from France, Italy, and the United States achieved sales growth. American wines are perceived as high-quality in Bulgaria, however they tend to be viewed as unaffordable by many consumers. For example, the average price of one liter of U.S. wines in 2016 was \$6.85, compared to \$1.93/liter for Italian wines, \$0.75/liter for Spanish wine, and \$2.39/liter average import price. Nonetheless, evolving consumer preferences for premium wines presents market opportunities for American wines.

**Table 5: Wine Supply and Demand, 2013-2016, thousand liters**

| <b>Wine Sector Development, 2012-2016</b>   |                                  |                                  |                              |                                    |                                    |
|---|----------------------------------|----------------------------------|------------------------------|------------------------------------|------------------------------------|
|   | <b>2013<br/>(000<br/>liters)</b> | <b>2014<br/>(000<br/>liters)</b> | <b>2015<br/>(000 liters)</b> | <b>2016 E<br/>(000<br/>liters)</b> | <b>2017 F<br/>(000<br/>liters)</b> |
| <b>Wine production, total</b>   | 188,341                          | 79,503                           | 151,090                      | 133,397                            | 130,000                            |
| - Commercial wine   | 172,447                          | 74,695                           | 131,015                      | 120,778                            | 120,000                            |
| - Home-made wine  | 15,894                           | 4,808                            | 20,075                       | 12,619                             | 10,000                             |
| <i>Imports</i>  | <i>6,541</i>                     | <i>4,947</i>                     | <i>8,917</i>                 | <i>7,320</i>                       | <i>9,000</i>                       |
| -Intra EU   | 5,884                            | 4,131                            | 7,930                        | 6,124                              | 7,000                              |
| -Extra EU   | 657                              | 816                              | 987                          | 1,196                              | 1,000                              |
| <b>Total supply</b>   | <b>194,882</b>                   | <b>84,450</b>                    | <b>160,007</b>               | <b>140,717</b>                     | <b>139,000</b>                     |
| <i>Exports</i>  | <i>50,901</i>                    | <i>43,305</i>                    | <i>38,264**</i>              | <i>28,821</i>                      | <i>26,000</i>                      |
| -Intra EU   | 35,801                           | 29,351                           | 32,752                       | 25,709                             | 24,000                             |
| -Extra EU   | 15,100                           | 13,954                           | 5,512                        | 3,112                              | 2,000                              |
| Local Market/Apparent Consumption and Stocks  | 143,981                          | 41,145 *                         | 121,743                      | 111,896                            | 113,000                            |
| Notes:  |                                  |                                  |                              |                                    |                                    |
| *According to official and industry sources, local wine consumption in 2014 was 110-120,000 MT which indicates that a significant quantity of old stocks were consumed on the market. Data about stocks is not typically published, the last available data is about stocks as of July 2012 at 73 million liters. |                                  |                                  |                              |                                    |                                    |
| ** Export and import data is based on World Trade Atlas/ Eurostat.  |                                  |                                  |                              |                                    |                                    |

Source: MinAg, WTA data, Euromonitor International; 2017 F- Forecast by FAS/Sofia

## TRADE

**Table 6: Wine Trade, 2014 – 2017 (January-October)**

| <b>HS#2204 Wine</b> | <b>2014</b> | <b>2015</b> | <b>2016</b> | <b>January-October 2017</b> | <b>January-October 2017</b> | <b>Difference in Percentage</b> |
|---------------------|-------------|-------------|-------------|-----------------------------|-----------------------------|---------------------------------|
| <i>Wine Imports</i> |             |             |             |                             |                             |                                 |
| • In 000 Liters     | 4,948       | 8,917       | 7,320       | 6,142                       | 7,634                       | +24.3%                          |
| • In U.S. \$        | 17.0        | 20.6        | 17.5        | 14.1                        | 14.3                        | +21.4%                          |

|                        |        |        |        |        |        |       |
|------------------------|--------|--------|--------|--------|--------|-------|
| (million)              |        |        |        |        |        |       |
| <i>Wine Exports</i>    |        |        |        |        |        |       |
| • In 000 Liters        | 43,305 | 38,264 | 28,821 | 14,622 | 24,459 | -0.7% |
| • In U.S. \$ (million) | 55.0   | 39.7   | 32.4   | 29.3   | 31.7   | +8.2% |

Source: WTA/Eurostat

## Exports

Bulgaria is a net wine exporter, although its exports have declined in absolute and relative terms. This trend persisted in 2016, as exports declined by 18 percent in volume and 15 percent in value, as due average export prices increased by nine percent, from \$1.04/liter in 2015 to \$1.13/liter in 2016. Prices to Bulgaria's most significant wine markets, Poland, Sweden, and the UK, were mostly higher than in 2015. Average prices to Poland were \$0.75/liter (\$0.69/liter in 2015); to Sweden at \$1.56/liter (\$0.50/liter in 2015), but declined slightly to the UK at \$1.42/liter (\$1.46/liter in 2015).

Although Bulgarian wine exports to Poland declined slightly in 2016, Poland remained Bulgaria's largest export market for a third consecutive year, with 38 percent of share in value and 57 percent share in volume of total exports. Post expects Poland to remain Bulgaria's largest wine market in 2017.

Sweden was the second largest export market in 2016, showing consistent growth since 2012. Exports to Sweden grew by four percent in volume and eight percent in value. Russia was the third largest export market in 2016 with 1.4 million liters. Exports to Russia began to decline in 2013 have dropped off considerably. 2016 wine exports to Russia decreased by five percent.

**Table 7: Bulgarian Wine Exports to Russia Development 2013-2016**

| <b>Bulgarian Wine Exports to Russia Development 2013-2016</b>                               |             |             |             |             |
|---|-------------|-------------|-------------|-------------|
|   | <b>2013</b> | <b>2014</b> | <b>2015</b> | <b>2016</b> |
| Relative share of wine exports to Russia to total Bulgarian wine exports in value, percent  | 26.9        | 27.4        | 10.3        | 4.1         |
| Relative share of wine exports to Russia to total Bulgarian wine exports in volume, percent | 26.7        | 27.9        | 10.2        | 4.9         |

Source: WTA

2017 data (Table 6) indicate that exports stagnate. During January-October 2017, exports declined by less than a percent in volume (24.4 million liters) but increased by eight percent in value (\$32 million) over the same period in 2016. Wineries are trying to shift exports to Western Europe, Asia, and the United States. Exports to the United States, Sweden, China, and Japan saw double-digit growth. The top export markets by volume remained Poland and Sweden, as Russia coming in at third-place. In value terms, China outpaced Russia with (\$4.7 million versus \$2.7 million).

## **Imports**

Imports have grown steadily since 2009 to reach record high volume and value in 2015. In 2016, however, imports declined by 18 percent in volume and by 15 percent in value. The average import price was three percent higher at \$2.39/liter.

Spanish, Italian, and French wines led imports in 2016 (by volume). Spanish exports to Bulgaria jumped by 41 percent. French exports rebounded and grew by 14 percent, while Italian exports declined by six percent (although Italy was the second largest supplier following Spain). In volume terms, wine from Spain and Italy accounted for 58 percent of imports. In value terms, French wines had the largest share at 30 percent, followed by Italy at 23 percent, and Germany at 10 percent.

In January-October 2017, imports rebounded and had a strong growth of 24 percent in imported quantities and 21 percent in value to \$14.3 million due to favorable demand. The average import price declined slightly to \$2.24/liter. Spain, Italy, France, Germany and New Zealand were the top suppliers with double digit growth for each country.

Also during this period, direct U.S. wines exports grew by 50 percent (9,550 liters) and by 108 percent in value (\$90,000). FAS Sofia research showed that U.S. wines enter the market not only directly but also through transshipments via Belgium and Germany, which increases total Bulgarian U.S. wines imports by an additional 10,000 liters and about \$100,000 in value terms.

## **POLICY**

Since January 1, 2016, Bulgaria and 13 other EU member states have implemented a system of planting rights for wine varieties (not for table grapes). Under this system, vineyards are limited to in planting certain varietals. Since 2016 new vineyard plantings cannot exceed one percent of actually planted area. Reportedly, currently wineries have planting rights for 6,800 HA which sets the limit for the country at below 70,000 HA for 2016-2030.

The Viticulture Program under the EU's 2014-2018 Common Agricultural Policy budgeted \$154 million (\$30 million/year). In 2016, 44 projects were approved for subsidized investment for 20.0 million leva (\$11.4 million), as the industry has strong interest in replacing old vine stocks with new plantings. For the 2016-2018 period about 50 million leva (\$29 million) from the program will be used annually to fund 132 such projects, of which 44 are to be implemented in 2016, 50 in 2017, and 34 in 2018. The indicative budget for 2019 is about \$30 million. Subsidies under the program cover up to 75 percent of expenses related to investments. In August 2017, the MinAg reported 52 approved winery projects and over 200 projects for farmers to expand and/or improve their vineyards, valued at \$27 million. In addition to replacing old vine stocks, there are increasing investments in irrigation systems due to more frequent hot and dry summers over the last five years.

In 2017 the Ministry of Agriculture and the Ministry of Tourism promoted 12 wine and culinary destinations in the country. Authorities plan to introduce these destinations to target tourist markets especially Chinese and other Asian tourists.

**Table 8: Bulgarian Wine Imports, 2013- 2017 (October), in value**

| <b>Bulgaria Import Statistics</b>  |               |       |       |       |       |              |         |         |
|--|---------------|-------|-------|-------|-------|--------------|---------|---------|
| <b>Commodity: 2204, Wine Of Fresh Grapes, Including Fortified Wines; Grape Must (Having An Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi</b> |               |       |       |       |       |              |         |         |
| Calendar Year: 2012 - 2016, Year To Date: 10/2016 & 10/2017  |               |       |       |       |       |              |         |         |
| 000' United States Dollars   |               |       |       |       |       |              |         |         |
| Partner  | Calendar Year |       |       |       |       | Year To Date |         |         |
| Country  | 2012          | 2013  | 2014  | 2015  | 2016  | 10/2016      | 10/2017 | %Change |
| World  | 16193         | 17791 | 17010 | 20590 | 17482 | 14055        | 17066   | 21.42   |
| France   | 3944          | 5495  | 5130  | 4555  | 5158  | 4026         | 4251    | 5.58    |
| Italy  | 5564          | 5014  | 3648  | 4963  | 3993  | 3181         | 4461    | 40.23   |
| Germany  | 1459          | 1571  | 1933  | 2086  | 1689  | 1429         | 1887    | 31.99   |
| New Zealand  | 772           | 673   | 1367  | 1317  | 1649  | 1282         | 1685    | 31.44   |
| Spain  | 596           | 539   | 722   | 1446  | 1609  | 1376         | 1829    | 32.88   |
| Chile  | 974           | 1360  | 1427  | 1244  | 947   | 735          | 747     | 1.56    |
| Netherlands  | 525           | 529   | 583   | 551   | 520   | 496          | 253     | -49.02  |
| United Kingdom   | 477           | 604   | 552   | 907   | 372   | 268          | 139     | -48.06  |
| Argentina  | 168           | 72    | 193   | 293   | 254   | 243          | 176     | -27.6   |
| South Africa   | 251           | 93    | 209   | 172   | 208   | 192          | 119     | -38.23  |

Source: WTA

**Table 9: Bulgarian Wine Exports, 2013-2017 (October), in value**

| <b>Bulgaria Export Statistics</b>  |               |       |       |       |       |              |         |         |
|--|---------------|-------|-------|-------|-------|--------------|---------|---------|
| <b>Commodity: 2204, Wine Of Fresh Grapes, Including Fortified Wines; Grape Must (Having An Alcoholic Strength By Volume Exceeding 0.5% Vol.) Nesoi</b> |               |       |       |       |       |              |         |         |
| Calendar Year: 2012 - 2016, Year To Date: 10/2016 & 10/2017  |               |       |       |       |       |              |         |         |
| 000' United States Dollars   |               |       |       |       |       |              |         |         |
| Partner  | Calendar Year |       |       |       |       | Year To Date |         |         |
| Country  | 2012          | 2013  | 2014  | 2015  | 2016  | 10/2016      | 10/2017 | %Change |
| World  | 62751         | 61941 | 55020 | 39724 | 36650 | 29341        | 31735   | 8.16    |
| Poland   | 13831         | 14704 | 14468 | 12700 | 12467 | 9473         | 10118   | 6.81    |
| Russia   | 18119         | 16674 | 15102 | 4102  | 4098  | 3374         | 2740    | -18.8   |
| Sweden   | 2818          | 3659  | 3725  | 3601  | 3896  | 3464         | 3992    | 15.27   |
| China  | 1911          | 982   | 1645  | 988   | 2760  | 2157         | 4684    | 117.11  |
| United Kingdom   | 2356          | 3427  | 3832  | 3259  | 2213  | 1854         | 1337    | -27.86  |
| Czech Republic   | 5496          | 4292  | 2770  | 1743  | 1428  | 1261         | 1341    | 6.34    |
| Belgium  | 1682          | 1189  | 1409  | 1381  | 1389  | 1149         | 1018    | -11.44  |
| United States  | 410           | 593   | 968   | 652   | 1210  | 1063         | 1112    | 4.59    |

Source: WTA

